Operational Excellence
Portfolio and Project Updates from the Operational Excellence Program Office

Operational Excellence at Work
Advising Council Progress Update Builds Collaboration

Members of the campus community joined the Advising Council and its three Working Groups on Dec. 6 for an interactive event. As pictured right, attendees offered input on advising issues, provided feedback on the Council's work to date, and learned about what's next for this OE project.

The project's three Working Groups, which represent both academic advising and co-curricular advising, have draft proposals ready to share with the campus community.

"This is a super collaborative effort -- we really want to hear from students, faculty, and advisors about how they think advising could work better," said Rebecca Miller, implementation manager for the Advising Council project and formerly the director of student services for two large academic departments on campus.

For a link to the full article, visit the OE website at: http://oe.berkeley.edu/

Program and Project Updates
Berkeley Operating Principles Approved!

WE ARE BERKELEY

OPERATING PRINCIPLES

WE INCLUDE AND EXCEL, TOGETHER
We cultivate trust, treat one another with respect and assume good intentions. We actively include different perspectives and work cooperatively within and across departments. We thrive when we celebrate the diversity in our community and our common commitment to equity, inclusion and equal access to all.

WE IMAGINE AND INNOVATE
We develop sustainable solutions that help us meet campus goals. We are willing to take intelligent risks, make mistakes, and learn from our experience.

WE SIMPLIFY
We reduce unnecessary steps and make it easier to get things done. Our solutions are common where they can be, custom when it counts.

WE ARE ACCOUNTABLE TO EACH OTHER
We measure supervisor, individual and team performance, make transparent decisions and follow through on our commitments. We recognize excellence, and give and receive constructive feedback at all levels to help us improve.

WE FOCUS ON SERVICE
We provide timely and excellent service to students, staff, faculty, alumni and other stakeholders. We emphasize service over bureaucracy whenever possible.

Berkeley
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We Are Berkeley! Following an extensive collaborative process, we have reached consensus on the Berkeley Operating Principles, which will help us achieve campus goals and make UC Berkeley a place where we can all do our best work. For information on the collaborative process that produced these operating principles, along with next steps, visit: http://WeAre.Berkeley.edu.

Campus Shared Services Goes Live. On Thursday, January 17, Campus Shared Services (CSS) will launch IT support for all faculty and staff in the Chancellor's Office, units within VCAF, IST, and the Office of the CIO, and groups who currently receive IT service from DOCS. See http://sharedservices.berkeley.edu/ for additional information on the launch. For the new CSS video, visit http://oe.berkeley.edu/.
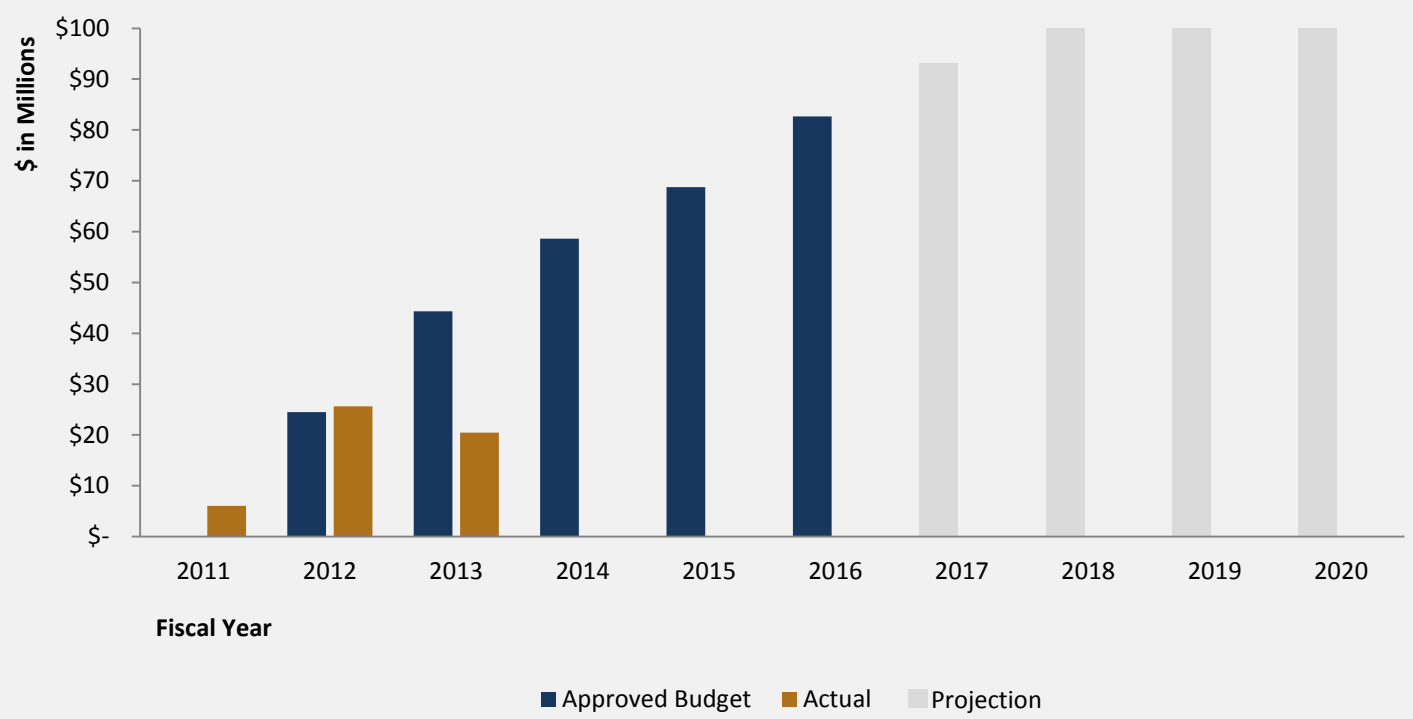
Cal Student Central Open For Business. On Tuesday, January 15, Cal Student Central launched a one-stop service center at 120 Sproul Hall for financial aid, fees and billing, payments, disbursements, registration, and enrollment. To see how Cal Student Central is improving the student experience, visit: http://studentcentral.berkeley.edu/.
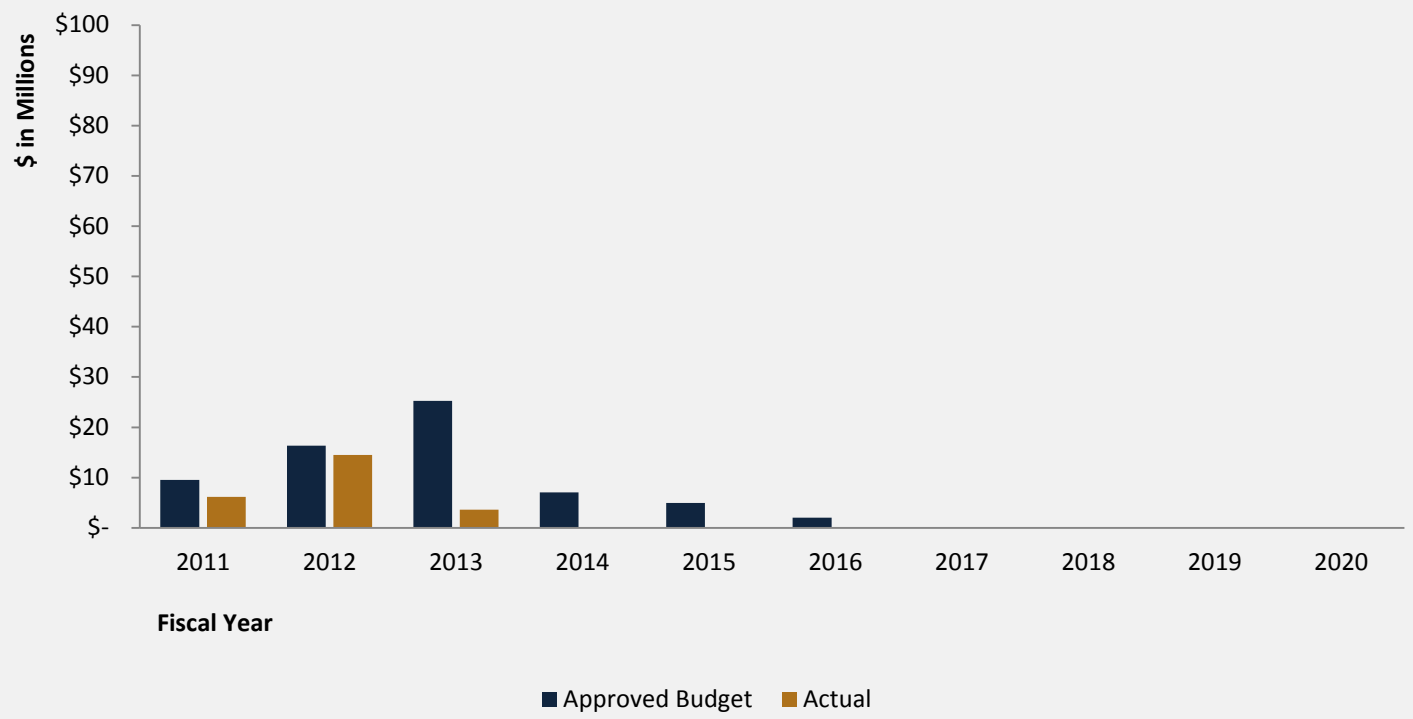
Portfolio At-A-Glance
Current active projects: 24
Project implementation completed and transitioned to operations: 2 (Unit Restructuring and BearBuy)
Total OE investment committed: $65.2 million
Projected on-going annual savings of approved projects: $82.6 million
Actual OE investment-to-date: $29.3 million
Cumulative savings-to-date: $55.1 million

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OE Portfolio Annual Savings
Actual Savings More Than Plan To Date

$ in Millions

Fiscal Year

Legend: ■ Approved Budget ■ Actual ■ Projection

OE Portfolio Annual Investment
Actual Investment Less Than Plan To Date

$ in Millions

Fiscal Year

Legend: ■ Approved Budget ■ Actual

Project Financial Profile

PROJECT	EXECUTIVE COMMITTEE APPROVAL DATE	COMMITTED OE INVESTMENT AS OF 11/30/12[A] $	OE EXPENSES AS OF 11/30/12 $	PROJECTED ANNUAL SAVINGS BY FY 2016 $	CUMULATIVE SAVINGS As of 11/30/12 $
ENERGY					
Energy Office	3/11/2011	4,021,000	547,700	2,095,300	-
Incentive Program	3/11/2011	2,039,300	560,400	740,000	-
Outreach	3/11/2011	482,300	151,700	700,000	-
FINANCE					
CalPlanning	3/11/2011	7,157,200	5,967,300	-	-
HIGH PERFORMANCE CULTURE					
Berkeley Operating Principles	8/26/2011	377,400	172,400	-	-
Metrics	8/26/2011	120,000	65,300	1,800,000	-
Target Talent Development	6/8/2011	595,000	-	-	-
IT					
IT Governance (Paused)	6/8/2011	3,959,000	196,100	-	-
IT Productivity Suite	6/8/2011	5,848,000	3,129,500	3,703,200	-
ORGANIZATIONAL SIMPLIFICATION					
Shared Services [B]	3/8/2012	20,720,000	5,583,100	6,900,000	-
CalTime	4/19/2011	3,676,000	2,175,300	7,300,000	-
Unit Restructuring	9/1/2010	3,371,000	2,414,500	18,300,000	41,000,000
PROCUREMENT					
BearBuy [C]	5/23/2011	4,354,400	3,882,800	33,000,000	13,788,000
STUDENT SERVICES					
Car Sharing	5/12/2011	-	-	112,300	
Cal Student Central	12/1/2011	1,150,000	381,400	208,000	-
Student Advising Council	11/11/2011	558,700	177,400	2,316,500	-
Student Technology Phase One [D] (Paused)	11/14/2011	648,000	637,900	-	-
Tools for Meal Plans	5/12/2011	-	-	747,000	400,000
NON-INITIATIVE PROJECTS					
Application Support Center - Help Desk	11/14/2011	588,000	543,100	-	-
Enterprise Data Warehouse - Governance	7/15/2011	357,000	248,300	-	-
Enterprise Data Warehouse - Procurement	7/15/2011	2,749,000	2,181,300	2,963,000	-
Enterprise Data Warehouse - Student Curriculum	9/6/12	931,000	31,000	1,154,800	
Enterprise Data Warehouse - Student Finances	7/15/2011	710,000	303,700	634,400	-
Transformation Support Services	8/9/2012	814,000	-	-	-

Notes

A. This report shows the OE-funded portion of each project. Project funding from other than OE sources, if any, does not appear here.

B. Although fiscal year 2016 is the analysis period for which all Operational Excellence projects are evaluated, annual savings for Shared Services are projected to increase beyond fiscal year 2016 and achieve $14.3 million in annual operating savings by fiscal year 2020.

C. Although fiscal year 2016 is the analysis period for which all Operational Excellence projects are evaluated, annual savings for BearBuy are projected to increase beyond fiscal year 2016 and achieve $45 million in annual operating savings by FY 2019. BearBuy savings to date include both one-time and on-going savings.

D. The OE Coordinating Committee has recommended that up to $11 million from the OE investment portfolio be earmarked to fund the anticipated proposal from Student Technology Phase One. The proposal is expected toward the end of 2012.

Operational Excellence Projects

OPERATIONS IMPROVEMENT

APPLICATION SUPPORT CENTER
The Application Support Center provides dedicated helpdesk support to the BearBuy, CalTime, CalPlanning, and Campus Shared Services implementation projects.

CALPLANNING
CalPlanning will enhance financial analysis, shift emphasis to decision support, and streamline the budget and planning processes.

CALTIME
CalTime will implement a single , automated campus-wide timekeeping solution to reduce costs and standardize pay cycles.

CAMPUS SHARED SERVICES
Campus Shared Services will develop a single, trusted source for human resources, finance, research administration, and IT support that is currently distributed unevenly in more than 200 locations across campus.

ENTERPRISE DATA WAREHOUSE (EDW) GOVERNANCE
EDW Governance funds a new Institutional Data Manager position to support development of a campus-wide Enterprise Data Warehouse, its governance , and its policies.

EDW PROCURE-TO-PAY REPORTING
EDW Procure-to-Pay Reporting will incorporate procurement data into the EDW to realize significant savings and efficiencies as well as improved data accuracy, reliability, and security.

EDW STUDENT FINANCIAL STATEMENT
EDW Student Financial Statement will incorporate and integrate student financial data into the EDW to realize improved analysis capabilities, as well as improved data accuracy, reliability, and security.

EDW STUDENT CURRICULUM
Cal Answers Student Curriculum, part of the EDW suite of initiatives, will provide managers across the campus with a shared and centrally supported reporting resource for analyzing student demand, enrollment needs, curricula changes, and faculty workload.

IT GOVERNANCE (PAUSED)
IT Governance will help the University to strategically address, prioritize, and coordinate new IT efforts with ongoing projects, processes, and operations.

METRICS
Metrics will develop guiding principles for the development and implementation of administrative performance metrics.

UNIT RESTRUCTURING
Unit Restructuring implemented a "spans & layers" analysis and methodology to create a flatter organizational structure campus-wide.

TRANSFORMATION SUPPORT SERVICES
Transformation Support Services will help schools and departments campus-wide define and implement a way of operating that delivers world-class administrative services in a financially sustainable way.

PROCUREMENT & COST CONTROL

BEARBUY
BearBuy is an e-procurement system that streamlines processes, increases efficiencies, and realizes significant long-term cost savings for campus purchasing.

CAR SHARE
Car Share will replace 40 underutilized vehicles with a campus-wide car-share program that will produces savings related to vehicle purchase, maintenance, and insurance.

ENERGY OFFICE
The Energy Office is tracking, overseeing, and managing campus energy use and offering financial incentives to operating units to reduce energy consumption.

ENERGY OUTREACH
The Energy Outreach project is implementing an outreach program focusing on individual action to reduce energy use and costs.

ENERGY POLICY
The Energy Policy project is establishing a Campus Energy Policy to articulate guidelines and standards relating to all aspects of campus energy use.

IT PRODUCTIVITY SUITE
IT Productivity Suite enhances collaboration between faculty, staff, and students by offering access best-in-class IT tools from Microsoft, Adobe, Google and more.

TOOLS FOR MEAL PLANS
Tools for Meal Plans is implementing several tools to bring more efficiency to residence hall dining food and beverage procurement and management.

IMPROVING THE STUDENT EXPERIENCE

ADVISING COUNCIL
Advising Council will align advising services and develop standards for performance, communication and assessment in curricular and co-curricular advising.

ONE STOP STUDENT BUSINESS CENTER
One Stop (Cal Student Central) will create a first point-of-service contact for the most common student business transactions.

STUDENT TECHNOLOGY PHASE 1 (PAUSED)
Student Technology will create an implementation plan for delivering a more seamless and full-service online experience for Berkeley students.

HIGH-PERFORMANCE CULTURE

BERKELEY OPERATING PRINCIPLES
The Berkeley Operating Principles will engage the campus community to develop a set of principles to guide and inspire staff in their work supporting UC Berkeley's mission.

TARGET TALENT DEVELOPMENT
Target Talent Development will enable the University to focus its learning and development efforts on positioning the workforce to meet the future needs of the University.

For more information: http://oe.berkeley.edu